

Type 2 Diabetes Mellitus Therapeutic and Drug Pipeline Review H2

Type 2 Diabetes Mellitus Therapeutic Pipeline Market Review, H2 2017

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Summary

Type 2 diabetes mellitus (T2DM) is a chronic, progressive and serious metabolic disorder characterized by hyperglycemia (high blood glucose levels) and associated with numerous complications and co-morbidities, including cardiovascular disease, nephropathy (kidney damage), neuropathy (nerve damage) and retinopathy (retinal damage).

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Global prevalence of the disease has risen rapidly in the past several decades, primarily as a result of rising obesity, a major risk factor for T2DM. This has resulted in a large, diverse and rapidly growing market landscape, comprising numerous different drug classes.

In particular, the emergence over the past decade of glucagon-like peptide-1 (GLP-1) receptor agonists, dipeptidyl peptidase 4 (DPP-4) inhibitors and sodium-glucose linked transporter-2 (SGLT-2) inhibitors has intensified competition. These new drug classes have been highly commercially successful, leading to considerable market growth. With a highly active late-stage pipeline, this trend is expected to continue over the coming years.

Differences between these products must be understood fully by companies seeking to position a novel drug in this market. This tabular heat map framework, designed to provide an easily digestible summary of these clinical characteristics, provides detailed readouts of all major late-stage clinical trial results for products in the T2DM market and late-stage pipeline. These are split



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along lines of therapy, and so are reflective of the treatment algorithm used in the clinic.

All safety and efficacy endpoints reported in these trials are displayed, for both the drug and control groups. In addition, key study characteristics such as the size, composition and patient segment of the study population are provided. These results are presented in a visually accessible, color-coded manner in order to maximize ease of use.

The accompanying text provides a detailed analysis of the clinical benchmarks set by the current market landscape, and the anticipated changes to these benchmarks, and to the treatment algorithm, as a result of the late-stage pipeline.

Scope

- What are the clinical characteristics of currently approved therapies for T2DM, in terms of specific safety and efficacy parameters?
- Will metformin continue to be the preferred first-line therapy?
- How will established drug classes such as the GLP-1 receptor agonists be impacted by upcoming pipeline competitors?
- Will biosimilar erosion significantly impact the insulin market?
- What technologies are late-stage pipeline therapies employing to improve patient convenience and ease of use?

Reasons to buy

- Understand the current clinical landscape by considering the treatment options available for each patient segment.
- Visually compare the currently approved treatments available at each line of therapy, based on the most important efficacy and safety parameters tested in clinical trials.
- Assess the current late-stage pipeline, in terms of the likely positioning of each product and the implications for the clinical landscape at each line of therapy.
- Build up a nuanced understanding of the clinical benchmarks set by these products, and consider how the current late-stage pipeline will affect these benchmarks.
- Assess your own pipeline programs in light of these benchmarks, in order to optimally position them and maximize uptake by clinicians.

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